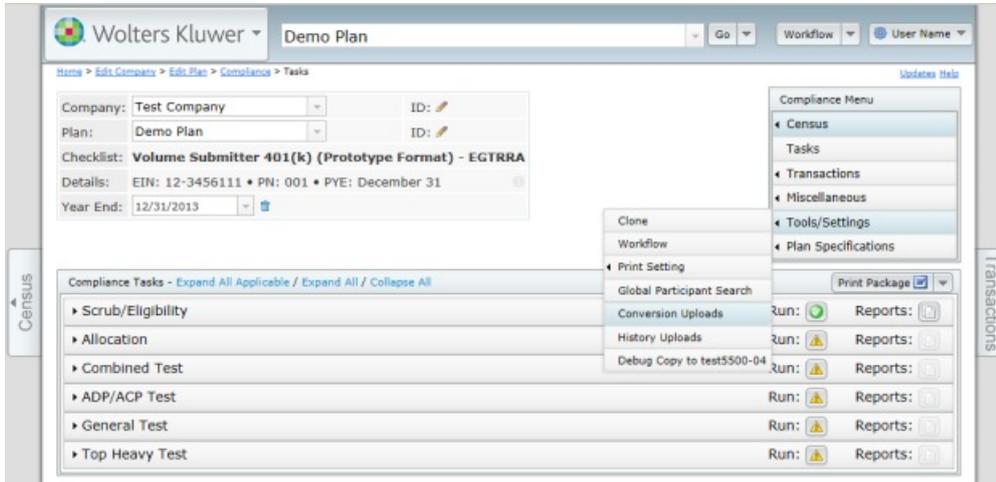


9.5. Conversion Uploads

10/29/2024 4:34 pm CDT

Conversion Uploads are accessed from the Compliance Menu, under “Tools/Settings”.



The options “Map DC Sources” and “DC Windows” are for upload of Datar participant information and end of year balances. You first need to click “Map DC Sources” and enter the two digit codes for each Datar source according to the appropriate ftwilliam source, indication where it should be mapped. Once you have done that you can click on “DC Windows” and upload your Datar file.

The options “Create DER Template” and “Upload DER” are for importing data from Relius. You will first need to click “Create DER Template”; this will open a Microsoft Excel spreadsheet formatted for entering data from the Relius system. You can then download your data and enter it into the spreadsheet and save the spreadsheet as a .csv file. Next you would upload it using the “Upload DER” link.

